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Session 14

Tools For Schools – FSA Assessments and the Quality Analysis Tool Software



Tools For Schools

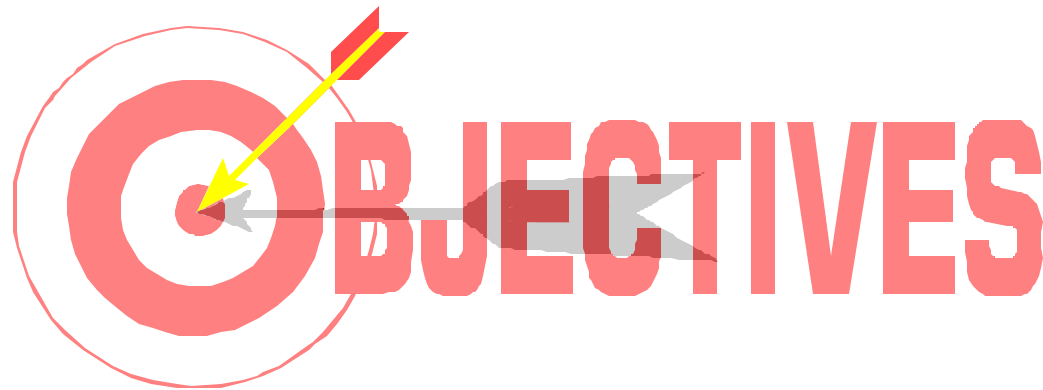
This session provides an overview of the redesigned tools developed by FSA to help schools improve the delivery of student aid and customer service. We will discuss the FSA Assessments and the Quality Analysis Tool (verification tool) available for all schools.



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Session Goals

- Introduce FSA's Tools for Success
- Review the Quality Analysis Tool
- Review the FSA Title IV Assessment Tool



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Quality Analysis Tool (Verification Tool)

- Part of the EDE Suite of Software
- Available to all schools in '02-'03
- Analyze FAFSA application/ISIR data
- Generate reports showing effect of data element changes on EFC/Pell Grant eligibility
- Improve/customize verification program
- Data to suggest future changes in federal verification selection criteria



Locally Designed Verification

- Focuses on local sources of error
- Identifies changes to FAFSA fields that have an impact on awards

What are the benefits of school-designed verification procedures?



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The Power of Data

- The Quality Analysis Tool allows schools to conduct in-depth analysis of applicant data
- A series of reports can be constructed using custom formats, selected fields and queries to extract specific information about your applicant population



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Software Components

- Import
- Tools
- Export
- Process
- Entry
- Print



Verification Profiles

- Allow schools to setup verification profiles
- Queries: complex or simple
- Designed to let schools know who they are selecting, who they are missing, and who they are “pestering.”



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Print

- Report Types
 - 9 “analysis” reports
 - Custom Report
 - Query Management
 - 3 Record Layout reports
 - System Setup
 - User Database



Quality Analysis Tool

- ALL analysis is simply structured comparison
- The QA Tool provides a variety of frameworks (reports) to make comparisons
- The QA Tool allows the user a great deal of flexibility in tailoring these comparisons to suit their institution's needs



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Purpose of Comparing

- Descriptions of applicants who experienced changes to EFC but were “missed” by verification
- Descriptions of applicants who had no changes to EFC but were “pestered” by verification
- Descriptions of applicants who self-correct information outside the verification process



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Who Benefits From Making Comparisons

- QA Program participants – fine tune effective institutional verification programs
- Non-QA Program institutions – evaluate the effectiveness of CPS edits on their campus
- FSA – fine tune CPS verification and evaluation of FAFSA



What We've Learned So Far

- Improve FAFSA instructions for and/or education efforts regarding estimating income and tax information
- Incorporate tax “estimators” into verification profiles
- Use - but don't overly rely on student/family income level when deciding who to verify
- Consider collecting information on the cost of verification.



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What are the FSA Self Assessments?

Tools to prevent and/or identify compliance issues, implement Management Enhancements for noted problems, and share Effective Practices



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What are the FSA Assessments?



- Originally for Quality Assurance schools' self-evaluation of Title IV operations
- Series of questions/comments outlining major requirements/policies needed to properly administer the Title IV programs (checklist, exercises, description boxes – who, what, when, where, why, how)
- Updated with hyperlinks to Reg's and the Student Financial Aid Handbook
- Addition of new, interactive assessments
- Now available for ALL schools

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What's In It For Me?

- Assessments empower your school to:
 - Self-awareness
 - Implement Management Enhancements (Action Plans)
 - Share Effective Practices
 - Utilize Technical Assistance Resources
- FREE!!!
- Help develop working relationship with ED
- Enlightenment
- Can help avoid a program review



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Mgt. Enhancements' Benefits

- **Allow you to take corrective action in order to resolve noted problems**
 - Identify problem
 - Required action
 - Identify resolution team (offices, team leads...)
 - Timeframe
 - Reminder to update policy & procedure manual
- **Link to the Management Enhancement Worksheet from each assessment**



What is the Effective Practice Database?

- A way to share practices that work well – “in running a school”
- A continuously expanding record from which schools can benefit (does not have to be Title IV related)
- *To facilitate sharing:* A direct link to share an idea in each assessment
- Currently in testing mode (Will be unveiled in the very near future)



What are Technical Assistance Resources?

- **A listing of all resources available to schools that need assistance**
 - Contact information, phone numbers, email...
 - Websites
 - Search engines
 - Technical/software support
- ***To facilitate use:* Each assessment has a link to the Technical Assistance Resources for quick reference**



Where can I find the FSA Assessments?

The assessments can be accessed at the following website:

qaprogram.air.org
("Tools for Schools")



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Tools For Schools

- Interactive assessments allow the school to complete self-evaluations online
- Non-Interactive assessments require download by schools
- All assessments provide hyperlinks to Regulations, Student Financial Aid Handbook
- All assessments have printing options



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Interactive assessments

- If your school wants to complete the assessment online and save it, a password will be required.
 - **User Name = OPEID**
 - **Password = *Create Your Own*** If you create your own password, you will be asked to register, and provide your email address.
 - **While online you will only have to enter this information once to move within other interactive assessments**
- If completing online, can email assessment through internet browser (file/send/page by email) and can print assessment with completed answers
- Schools can view the assessments in the tour mode without a password (unable to complete online).
- If you do not want to complete the assessment online, you may download the assessment. Save it to your hard drive and complete it later.



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Multiple User Error Message

Registration

[Home](#)

STUDENTS
SCHOOLS
MANAGING FUNDS
CAMPUS NEEDS



This OPEID is registered to the individual below. Please contact this person for the password to access the record.

OPEID: 11111111
Last Name: Ngo
First Name: Hoai-Anh
Office: AIR
Phone: 202-123-4567
Email: harry703@yahoo.com
University Name: Matthew's University

[Go back to login Screen](#)

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Tools For Schools

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In collaboration with financial aid professionals, SFA has designed many assessment modules to help schools enhance their services. The modules are based on applicable laws and regulations.

There are four categories



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[Schools](#)



[Managing Funds](#)



[Campus Needs](#)

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Students

*** Interactive
Assessment**

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SFA Assessments

Students

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[Satisfactory Academic Progress](#)

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SFA has collaborated with schools to build three modules focusing on including an interactive (*) one designed to be completed online:



[Students](#)

- [Student Eligibility](#)
- [Awarding Aid](#)
- [Satisfactory Academic Progress*](#)

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Schools

*** Interactive
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In support of key school management tasks, SFA has developed the following modules. Three are interactive (*) - designed to be completed online



[Schools](#)

- [Institutional Eligibility](#)
- [Consumer Information*](#)
- [Recertification*](#)
- [Change in Ownership*](#)

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Managing Funds

*** Interactive
Assessment**

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Managing Funds

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MANAGING FUNDS

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Matters](#)
[Disbursing Aid](#)
[Reporting and
Reconciling](#)
[Financial
Responsibility and
Cash Management](#)
[Return of Title IV
Funds](#)
[Perkins](#)

In support of schools' finance tasks, SFA has developed 10 modules.
interactive (*) - designed to be completed online:



Managing funds

- [General Fiscal Matters](#)
- [Disbursing Aid](#)
- [Reporting and Reconciling](#)
- [Financial Responsibility and Cash Management*](#)
- [Return of Title IV Funds*](#)
- [Perkins](#)
 - [Due Diligence](#)
 - [Repayment](#)
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Campus Needs

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CAMPUS NEEDS

[Automation](#)
[Administrative](#)
[Capabilities](#)



Recognizing that each campus faces its own technical and administrative challenges, SFA has developed two modules to support assessments areas:



[Campus Needs](#)

- [Automation](#)
- [Administrative Capabilities](#)

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Printing the Assessments

- All FSA Assessments can be downloaded.

Download this assessment
to your computer



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Printing the Assessments



- The “Print this Module” button at the bottom of each page of the Interactive Assessments will allow the user to print while the user has the assessment on the screen.
- Both Interactive and Non-interactive assessments will have printable Word documents
- All assessments have the similar printing features.



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Future Assessments

- The assessments will be updated annually
- More web-based assessments will be added
- Constant feedback needed from schools



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In Summary

- **The more you put into the assessments,
the more you will get out of them**
- **Don't assume that everything you do is
in compliance**
 - **Be willing to change**
- **Administering the Title IV programs is
an Institutional-Wide Effort**



Questions?

We appreciate your feedback and
comments via Email at:

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